Quick Reference Guide
Work Request Intake System (WRIS) - Submitter Role

Work Request Intake System

Introduction

The Work Request Intake System (WRIS) replaces the ITCD Work Management System (IWMS) previously used to submit IT work (service) requests. This Quick Reference guide covers the features used by those with a Submitter role in WRIS.

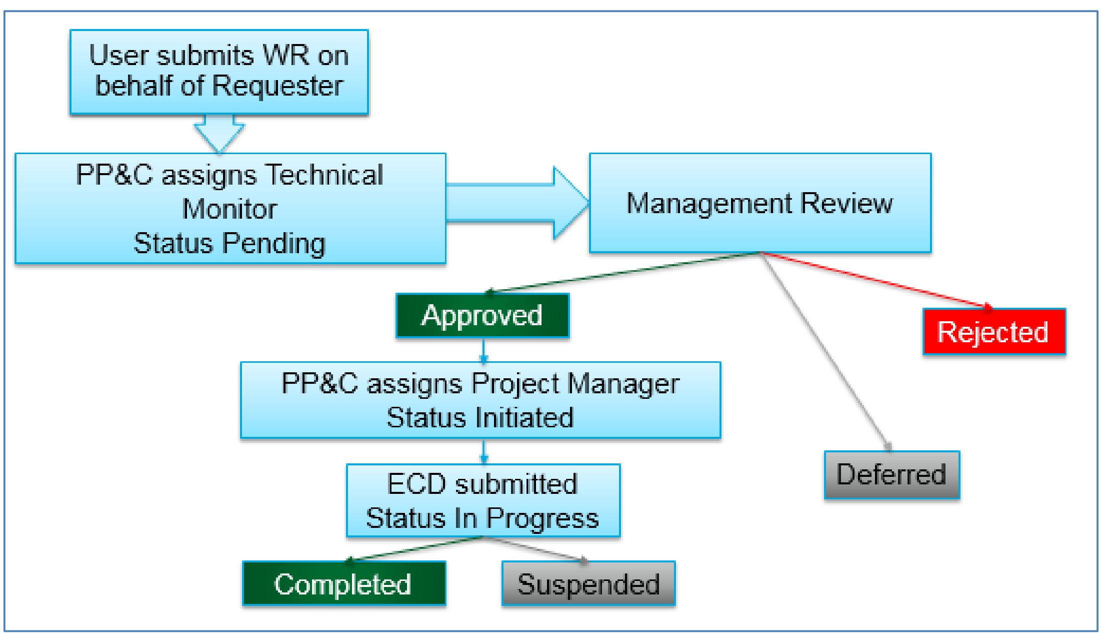
Work Requests (WR) were formerly called Service Requests.

Below is a table defining the various roles and access a user could have in WRIS.

Role	Access
Submitter	Read access. Can create WRs. Can search and run reports. Can be civil servant or contractor.
Requester	Owner of WR. Must be civil servant.
Project Planning & Control (PP&C)	Manages review process of WR. Assigns Technical Monitor and Project Manager. Assigns milestone dates. Can create, read and edit WR. Updates status. Can search and run reports.
Technical Monitor	Helps define requirements for WR. Can read, search and run reports.
Project Manager	Management Review of WRs. Assigns milestone dates, Submits ECD. Updates Status. Can create, read, edit, search and run reports.

All NASA HQ users (civil servants and contractors) are automatically in the system as Submitters.

Below is a chart which illustrates the WR workflow and status updates as the WR is processed in the system.



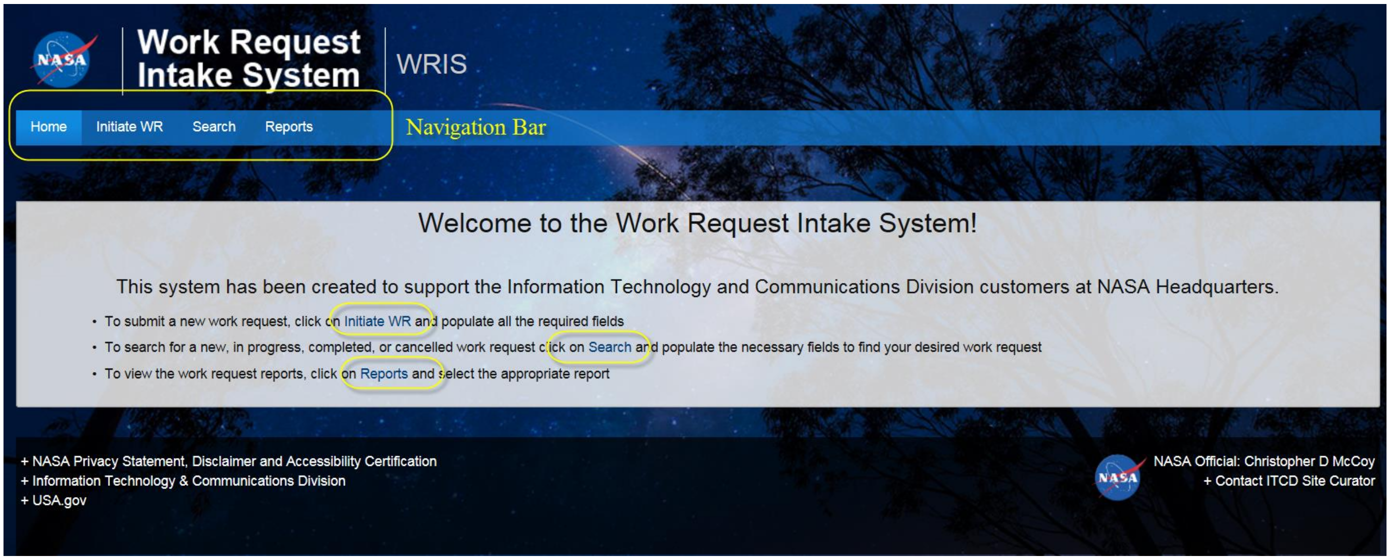
Understanding the Uses and Features of WRIS

WRIS provides several tools for users including:

- an intake form for Submitters (used to capture hi-level work);
- a reports and views function that allows users the capability to generate status based Reports; and
- a search capability that allows users to search on several fields or a combination of fields.

Logging Into WRIS using Windows 7

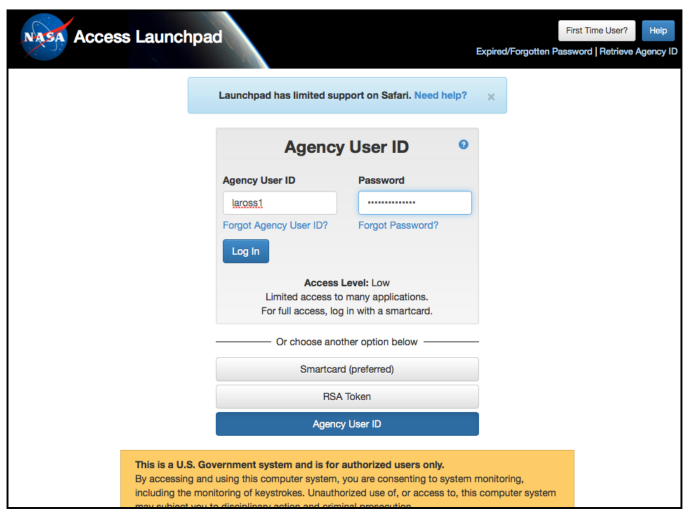
1. Enter the URL https://wris.hq.nasa.gov in your preferred browser.
2. After authentication, a *Home Page* displays (shown below).
3. On the *Home Page* do the following:
    - Use the *Navigation Bar* to move through screens for **Home**, **Initiate WR**, **Search** and **Reports.**
    - Click on the links in the text to navigate to the various screens.



Mac users and other may need to authenticate using Launchpad. Follow the instructions below if your machine is redirected to the Access Launchpad screen (shown below right).

Logging into WRIS using Launchpad

1. Enter the URL https://wris.hq.nasa.gov in your preferred browser. The *Access Launchpad screen* displays (shown right).
2. Enter your AUID in the **Agency User ID** field and your NDC network password in the **Password** field
3. Click **Login**. After authentication, the *Home Page* displays (shown above).



Initiating a WR

1. From the *Home Page* shown on the previous page, click **Initiate WR** on the *Navigation Bar*. The *WR Intake Form* displays.

Below is a chart which includes all the fields in the form and the properties of those fields.

WR Intake Form Field	Field Properties
Requester	Required – must be civil servant
Work Request ID Number	Generated by system – cannot be edited
Task Order Number	Required

Submitter	Generated by system and user authentication
Descriptive Title of Request	Required field – up to 255 characters
Requirements Definition	Required field – up to 2.000 characters
Priority	Required field - Low, Medium, or High
Technical POC who helped define the requirements	Optional field – 75 characters
Will this WR involve access to classified information?	Required field – Yes or No
Justification	Optional field – 2,000 characters
Comments	Optional field – 2,000 characters
Upload documents	Upload up to five (5) supporting documents

2. Define the **Requester.**

If the user is a Civil Servant, WRIS will ask if the user is the Requester.

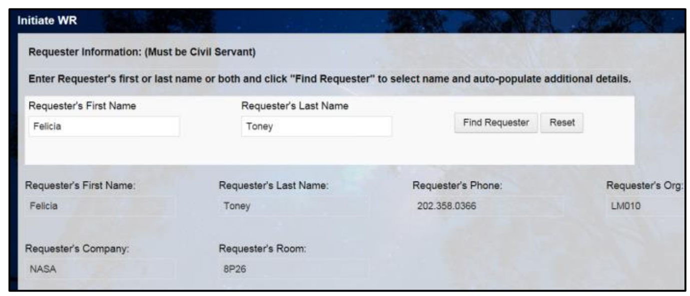
   a. If the **Yes** radio button is selected, the WR will autofill the user's information into both the **Requester** and **Submitter** fields.

   b. If the **No** radio button is selected, the user will be able to select the **Requester** with the fields provided.

   c. Enter the Requester's first and last name in the fields provided.

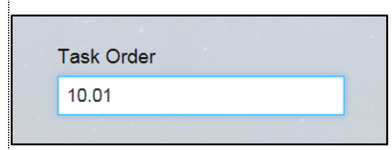
   d. Click **Find Requester** and select the Requester from the search result. The **Requester's name**, **phone number**, **organization**, **company** and **room number** will auto-populate as shown to the right.

Click Reset to clear the Requester.



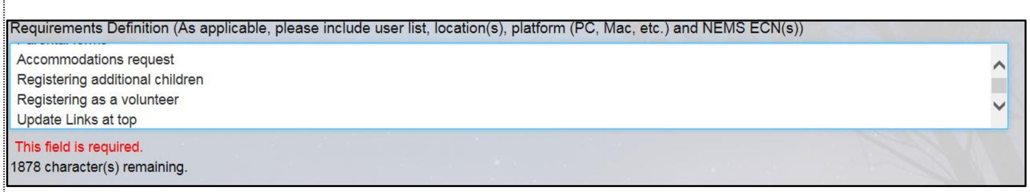
3. The **WR ID** is generated by the system. The ID assigned to the WR will generate a number with the same format as in IWMS (for example 2015-00001).
4. Enter the appropriate **Task Order** (shown right).
5. Enter a **Descriptive Title of Request** (shown below).

This is a required field with up to 255 characters.

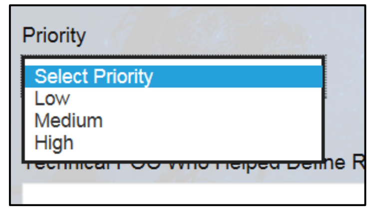


6. Enter a **Requirements Definition** (shown right).

Please include user lists, locations, platform, etc. This is a required field with up to 2,000 characters.

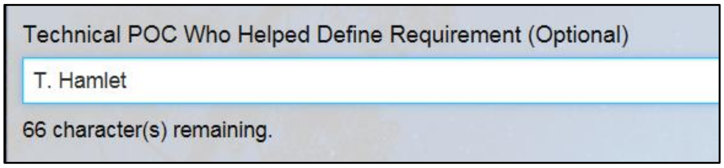


7. Click the **Priority** drop-down arrow and select from the options **Low**, **Medium**, or **High** (shown right).

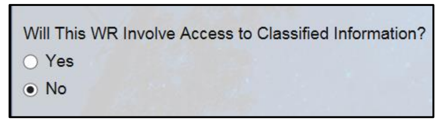


8. Enter the **Technical POC** who helped define the requirements (shown below).

This is an optional field with up to 75 characters.

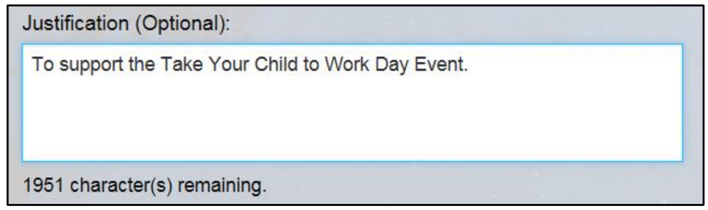


9. Answer the question "will this WR involve access to classified information?" by selecting the appropriate radio button.



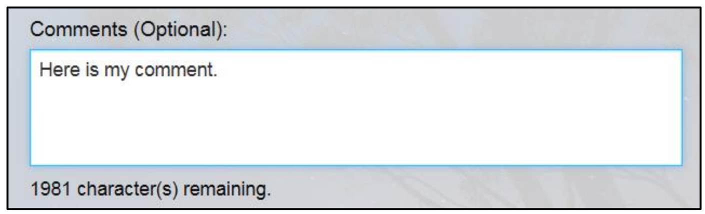
10. Enter a **Justification** for the WR.

This field is optional with up to 2,000 characters



11. Enter a C**omment** in the field provided.

This is an optional field with up to 2,000 characters



The Submitter's information will auto-populate based on the person entering the data and can be a civil servant or a contractor.

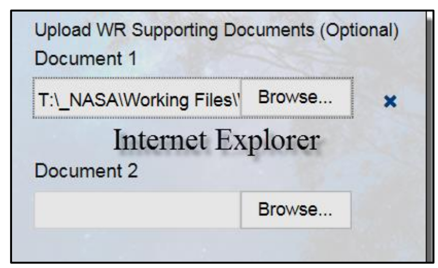
12. May upload up to five supporting documents. Click the **Browse** button and locate the file to be uploaded.

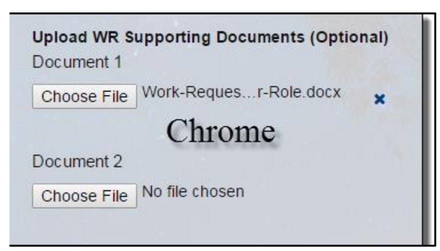
Depending on the browser you are using, the file names may display differently. See the screenshots to the right.

Uploaded files are restricted to 10 MB and to the following extensions: txt, .pdf, .jpg, .doc, .docx, .ppt, .pptx, .xls, .xlsx.

Only requesters and submitters are able to view the contents of uploaded files.

Click the "X" that appears next to the uploaded file to delete the file. A new file can then be uploaded.





13. Click **Save** to save the WR.

Clicking the Cancel button will clear all the input fields and return the user to the top of the screen.

When the WR has been saved, a message will appear at the top of the screen that the WR has been submitted successfully.

Editing a WR

Only those with Project Manager or Project Planning & Control (PP&C) permissions are able to edit a WR.

Searching for WRs

A simple search capability is provided on the *Search* page. Search results are read-only and 10 items are displayed by default. Searching returns a list of WRs with a link on the left to the actual WR and another link at the far right. Search results are sortable by clicking on the title of the column. A search cannot be saved.

1. Click **Search** on the *Navigation Bar*. The search screen displays with a list of ten WRs.

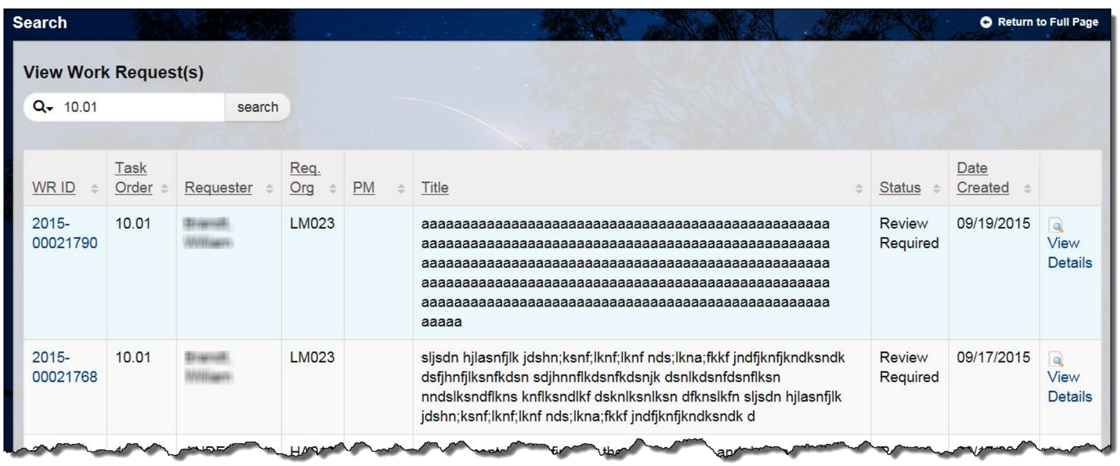
You can scroll through additional pages of results in increments of 5, 10, 20, 30, 50, and 75 by changing the increment at the bottom of the screen.

2. Click into the **Search** field and enter keywords to search for or click the **drop-down arrow** to search using multiple fields.

In addition to Key Words, you can search on the following fields by clicking the drop-down arrow for the search:

Requestor Last Name	Requestor First Name
Submitter Last Name	Submitter First Name
Status	Work Request ID
Work Request Title	

3. Enter data in the desired fields and click **Search.** The search result displays (shown below).



Running Pre-defined Reports

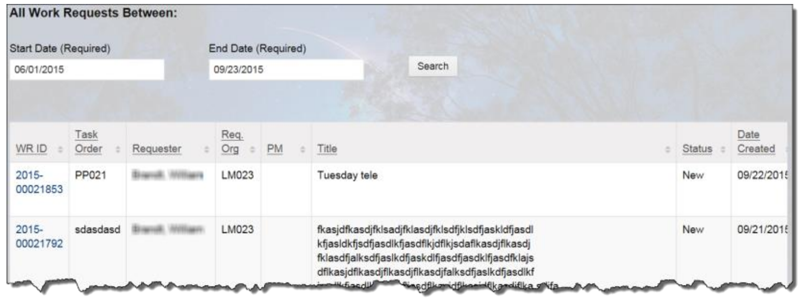
The *Reports* page has links to pre-defined reports. After running a report, click **Reports** on the *Navigation Bar* to return to the *Reports* page and run a different report. The Report screen displays with a list of ten WRs. You can scroll through additional pages of results in increments of 5, 10, 20, 30, 50, and 75 by changing the increment at the bottom of the screen.

The pre-defined reports available in WRIS are:

Report	Description
Work Requests by Start and End Date	This Report returns all Work Requests created in a selected date range.
Work Requests Ordered for a Given Year Range (Ex: Work Requests from 2010 to 2015 inclusive)	This Report returns all Work Requests created in a given year range inclusive of the beginning and end years (for example, Work Requests from 2010 to 2015 inclusive).
Work Requests with No PMs Assigned	This Report returns all Work Requests that do not have a PM assigned.
Work Requests by Submitter	This Report returns all Work Requests requested by a Submitter.
Work Requests by Requester	This Report returns all Work Requests requested by a Requester.

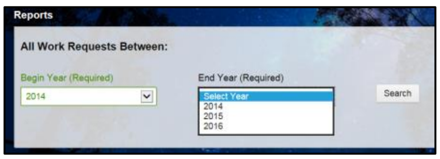
Work Request by Start and End Date Report

1. Click **Reports** on the *Navigation Bar* to display the pre-defined reports.
2. Click **Work Request by Start and End Date Report.**
3. Enter **a State Date** and an **End Date**.
4. Click **Search.** The search result displays.

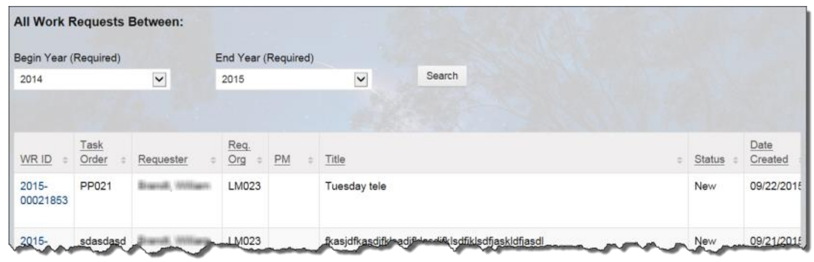


Work Requests Ordered for a Given Year Range

1. Click **Reports** on the *Navigation Bar* to display the pre-defined reports.
2. Click **Work Requests Ordered for a Given Year Range.**

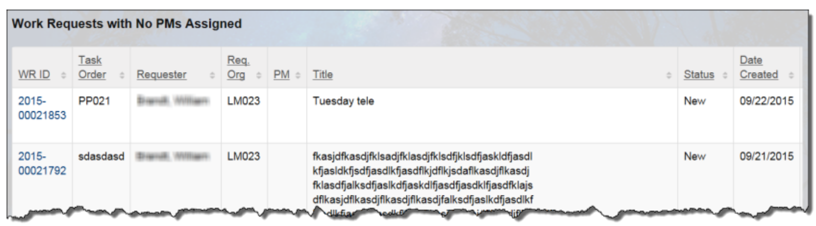


3. Select the **Begin Year** and select the **End Year.**
4. Click **Search.** The search result displays.



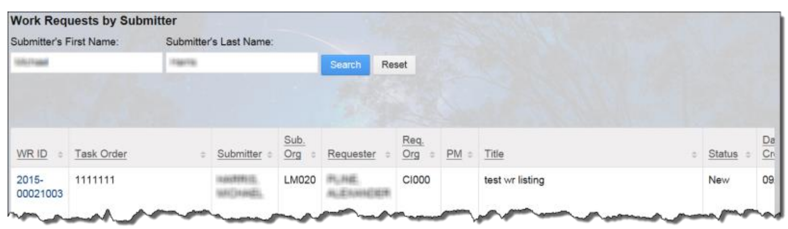
Work Requests with No PM Assigned

Simply click on the link to the report on the *Reports* page and the search will displays WRS with an assigned Project Manager.



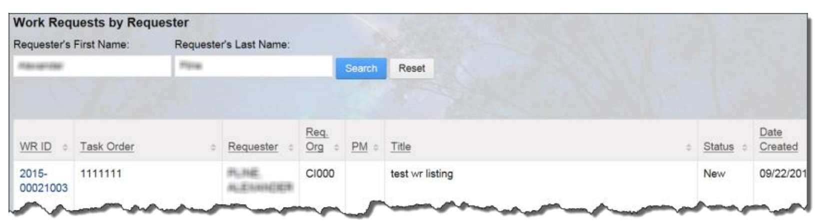
Work Requests by Submitter Report

1. Click **Reports** on the *Navigation Bar* to display the pre-defined reports.
2. Enter the **Submitter's First Name** and **Last Name**.
3. Click **Search.** The search result displays.



Work Requests by Requester Report

1. Click **Reports** on the *Navigation Bar* to display the pre-defined reports.
2. Enter the **Requester's First Name** and **Last Name**.
3. Click **Search.** The search result displays.



Reports return a list of ten (10) WRs with a link on the left to the actual WR.

You can scroll through additional pages of results in increments of 5, 10, 20, 30, 50, and 75 by changing the increment at the bottom of the screen.